

Article Number: Keying Rental for Customer Reimbursement

Issue: Enter a rental to reimburse customer

Resolution:

1. Refer to [SOP: Claims Number Search in CMS](#)
2. From the Claims page, click the **Estimate** tab.
3. From the Estimate screen, click the Lock icon to lock the claim.
 - a. Once locked, the claims show the username that has the claim locked with a timer, and **[Unlock]** icon will highlight.
4. Once locked click the **Add Claim Item** button.

Result: Estimate Screen opens.
5. Enter the estimate with the following:
 - a. In the Coverage Group field, select the **Rental** option.
 - b. In the Coverage Item field, select the **Rental** option, or **Alternative Transportation**, if using ride share.
6. When selecting the Rental, the Estimate changes to Service; click **Continue Estimate**.
 - a. In the Payable Type field, select the **Service Contract** option.
 - b. Select **Customer** as the Payee Type.
 - c. In the Quantity field, enter the number of rental days for which the customer is eligible.
 - d. In the Vendor Rate field, enter the daily rate from rental invoice.
 - e. In the AAS Rate field, enter the contract daily maximum.
 - f. In the Authorized Rate field, enter the lesser amount between the AAS Rate or Vendor Rate.
7. Click the **Save** button.
 - a. Click the Unauthorized link to confirm the entry and the rental is visible.
8. Click the **Unlock** button to unlock the claim.
9. Send a message to the Team Lead and then refer to [SOP: Assigning a Task - CMS](#) add the CMS task to the Lead for authorization.
10. Add the Rental Note in CMS refer to [SOP: Inputting notes into CMS](#).

Related References and Documents:

[SOP: Claim Number Search in CMS](#)

[SOP:Assigning a Task - CMS](#)

[SOP: Inputting notes into CMS](#)

Purpose

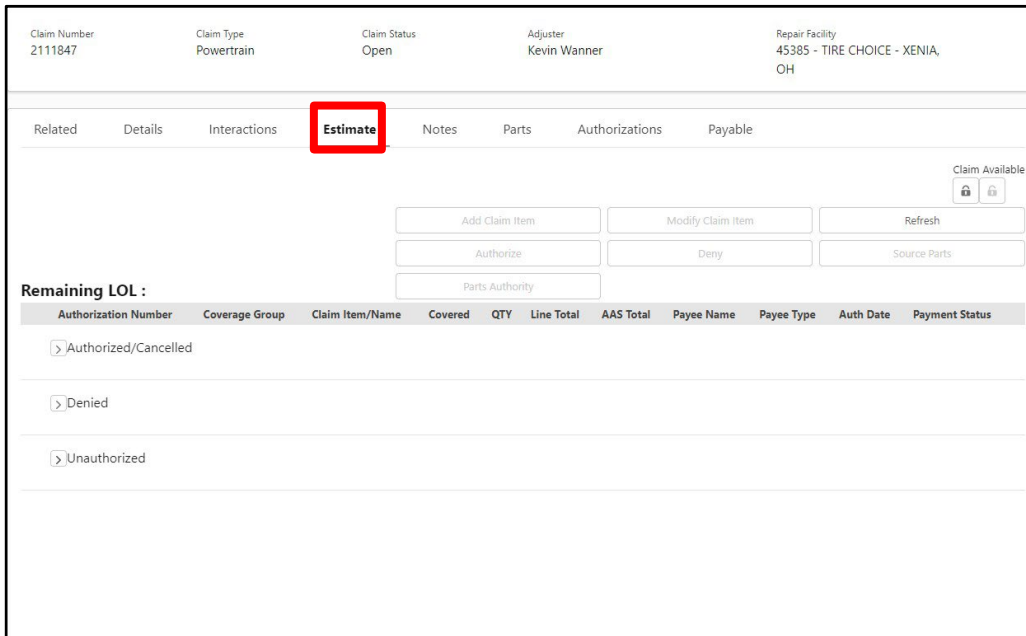
This SOP is intended to outline how to key in rental reimbursement.

Teams Impacted

- Claims
- Customer Service



Procedure

1. Refer to SOP: "Claims Search" in the Customer Service Knowledge Base.
2. You will land on the Claim page.
 - a. Click on the **Estimate** tab.



Claim Number: 2111847 Claim Type: Powertrain Claim Status: Open Adjuster: Kevin Wanner Repair Facility: 45385 - TIRE CHOICE - XENIA, OH

Related Details Interactions **Estimate** Notes Parts Authorizations Payable

Claim Available  

Add Claim Item Modify Claim Item Refresh

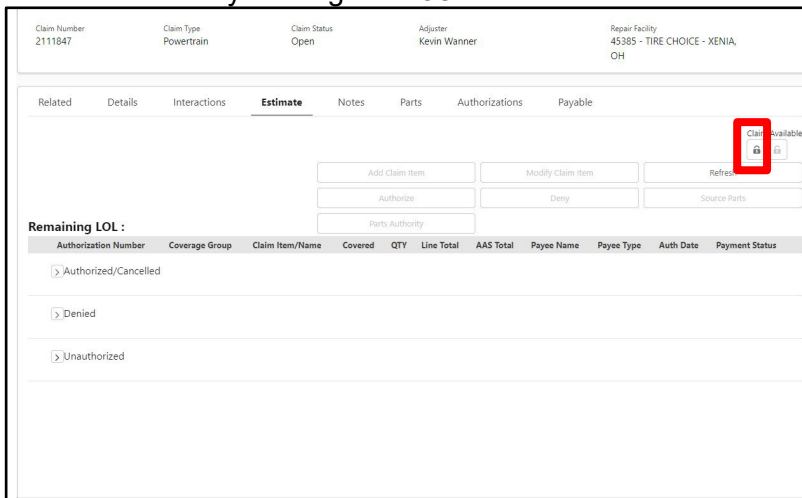
Authorize Deny Source Parts

Parts Authority

Remaining LOL :



Authorization Number	Coverage Group	Claim Item/Name	Covered	QTY	Line Total	AAS Total	Payee Name	Payee Type	Auth Date	Payment Status
> Authorized/Cancelled										
> Denied										
> Unauthorized										

- b. Lock the claim by clicking the **Lock** button.



Claim Number: 2111847 Claim Type: Powertrain Claim Status: Open Adjuster: Kevin Wanner Repair Facility: 45385 - TIRE CHOICE - XENIA, OH

Related Details Interactions **Estimate** Notes Parts Authorizations Payable

Claim Available  

Add Claim Item Modify Claim Item Refresh

Authorize Deny Source Parts

Parts Authority

Remaining LOL :

Authorization Number	Coverage Group	Claim Item/Name	Covered	QTY	Line Total	AAS Total	Payee Name	Payee Type	Auth Date	Payment Status
> Authorized/Cancelled										
> Denied										
> Unauthorized										



Locked by Charles Dunn (9m 16s)

- [illegible]

- Add Claim Item

Locked by Charles Dunn (9m 27s)

Coverage Group

*Select an Option...

Coverage Item

*Select an Option...

Covered

Payable Type

*Service Contract

Payee Type

Select an Option...

Payee Name

Save

Save & Add New

- a. Select **Rental** under coverage group drop down menu.



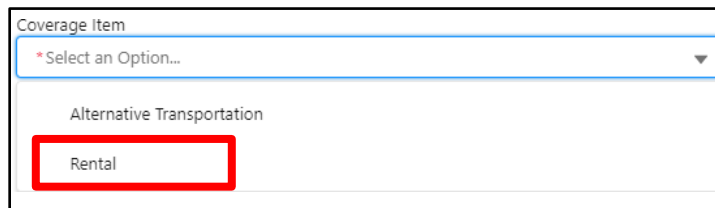
Coverage Group

*Select an Option...

Rental

Road Service

- b. Select **Rental** under coverage item drop down menu as well.



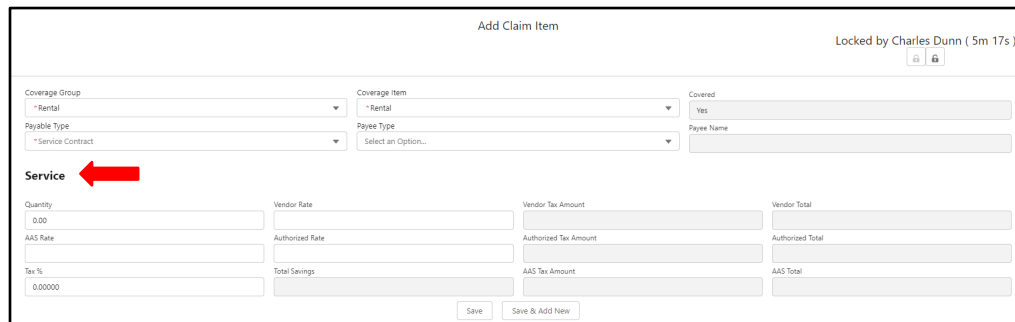
Coverage Item

*Select an Option...

Alternative Transportation

Rental

Note: You will see additional requirements added to be filled in on the add claim item screen, please refer to the example photo below.



Add Claim Item

Locked by Charles Dunn (5m 17s)

Coverage Group: Rental

Coverage Item: Rental

Payable Type: Service Contract

Payee Type: Select an Option...

Service

Quantity: 0.00

AAS Rate:

Tax %: 0.00000

Vendor Rate:

Authorized Rate:

Total Savings:

Vendor Tax Amount:

Authorized Tax Amount:

AAS Tax Amount:

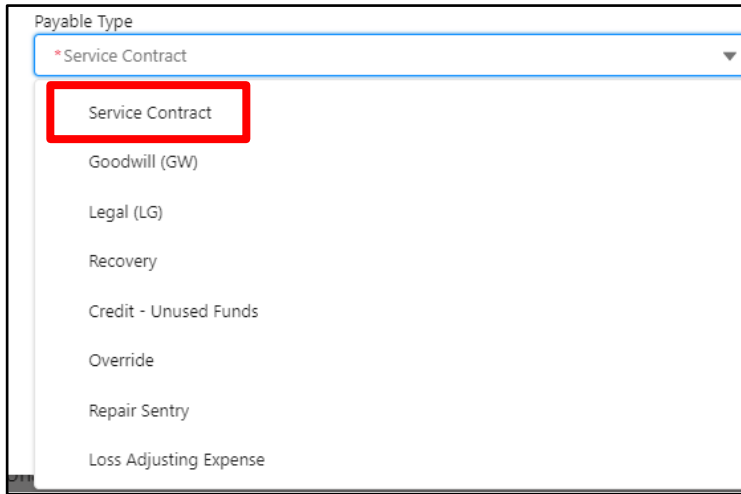
Vendor Total:

Authorized Total:

AAS Total:

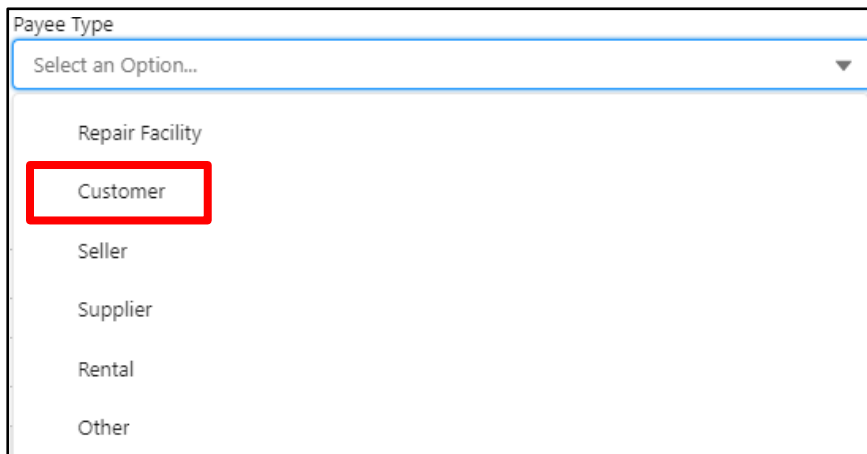
Save Save & Add New

- c. Select **Service Contract** under payable type drop down menu.



A screenshot of a 'Payable Type' dropdown menu. The menu is open, showing a list of options. The first option, '* Service Contract', is highlighted with a red rectangular box. Other options listed include Goodwill (GW), Legal (LG), Recovery, Credit - Unused Funds, Override, Repair Sentry, and Loss Adjusting Expense.

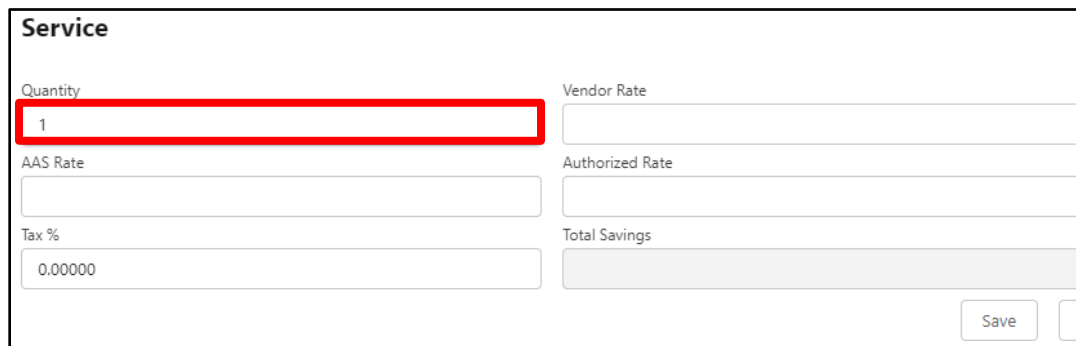
- d. Select **Customer** under payee type drop down menu.



A screenshot of a 'Payee Type' dropdown menu. The menu is open, showing a list of options. The second option, 'Customer', is highlighted with a red rectangular box. Other options listed include Repair Facility, Seller, Supplier, Rental, and Other.

Reminder: AAS administrates 6 different contracts please refer to the rental section on the contract to verify what rental benefits the contract holder has.

- e. Under **Quantity** type in the number of days the claim qualifies for.



A screenshot of a 'Service' form. The 'Quantity' field, located in the top left section, contains the number '1' and is highlighted with a red rectangular box. Other fields include 'Vendor Rate', 'AAS Rate', 'Authorized Rate', 'Tax %' (set to 0.00000), and 'Total Savings'. A 'Save' button is visible in the bottom right corner.

- f. Under **Vendor Rate** type in the amount that the rental company is charging per day.

Quantity	Vendor Rate
1.00	70.00
AAS Rate	Authorized Rate
Tax %	Total Savings
0.00000	
<div>Save</div>	

- g. Under **AAS Rate** type in the maximum amount that the contract rental benefit qualifies for per day.

Quantity	Vendor Rate
1.00	70.00
AAS Rate	Authorized Rate
40.00	
Tax %	Total Savings
0.00000	30.00
<div>Save</div>	

- h. Under **Authorized Rate** type in the amount that AAS is authorizing per day.

Reminder: The authorized rate cannot exceed AAS Rate.

Quantity	Vendor Rate
1.00	70.00
AAS Rate	Authorized Rate
40.00	40.00
Tax %	Total Savings
0.00000	30.00
<div>Save</div>	

4. Click **Save**.

Add Claim Item

Locked by Charles Dunn (9m 28s)

Coverage Group

Coverage Item

Covered

Payable Type

Payee Type

Payee Name

Service

Quantity	Vendor Rate	Vendor Tax Amount	Vendor Total
1.00	70.00	0.00	70.00
AAS Rate	Authorized Rate	Authorized Tax Amount	Authorized Total
40.00	40.00	0.00	40.00
Tax %	Total Savings	AAS Tax Amount	AAS Total
0.00000	30.00	0.0	40.00

5. You will land back on the **Estimate** page.

Claim Details

Claim Number 2112062	Claim Type General	Claim Status Open	Adjuster Matthew Northcutt	Repair Facility 66441 VALOR AUTOMOTIVE
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Related

Details

Interactions

Estimate

Notes

Parts

Authorizations

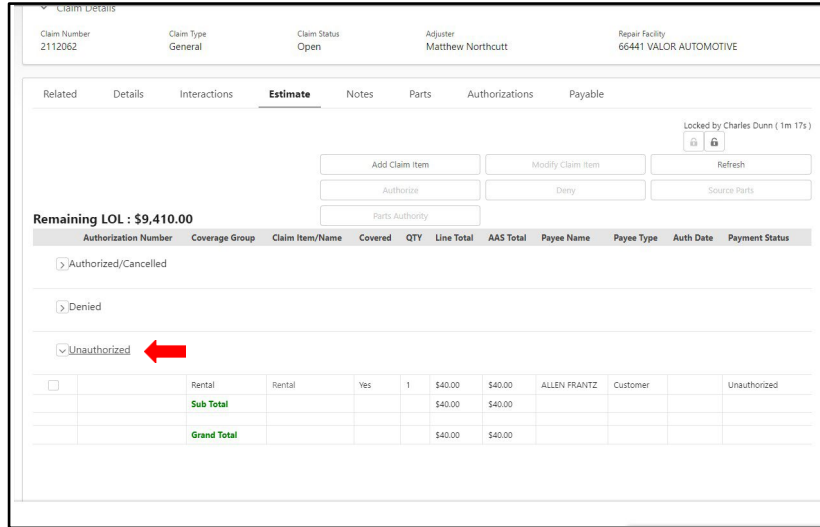
Payable

Locked by Charles Dunn (4m 0s)

Remaining LOL : \$9,410.00

Authorization Number	Coverage Group	Claim Item/Name	Covered	QTY	Line Total	AAS Total	Payee Name	Payee Type	Auth Date	Payment Status
<input type="button" value="Authorized/Cancelled"/>										
<input type="button" value="Denied"/>										
<input type="button" value="Unauthorized"/>										

- a. Check that rental was keyed in by clicking the drop-down arrow next to **Unauthorized**.



Claim Details

Claim Number: 2112062 | Claim Type: General | Claim Status: Open | Adjuster: Matthew Northcutt | Repair Facility: 66441 VALOR AUTOMOTIVE

Related | Details | Interactions | **Estimate** | Notes | Parts | Authorizations | Payable

Locked by Charles Dunn (1m 17s)

Buttons: Add Claim Item, Modify Claim Item, Refresh, Authorize, Deny, Source Parts, Parts Authority

Remaining LOL : \$9,410.00

Authorization Number	Coverage Group	Claim Item/Name	Covered	QTY	Line Total	AAS Total	Payee Name	Payee Type	Auth Date	Payment Status
Authorized/Cancelled										
Denied										
Unauthorized										
		Rental	Rental	Yes	1	\$40.00	\$40.00	ALLEN FRANTZ	Customer	Unauthorized
		Sub Total				\$40.00	\$40.00			
		Grand Total				\$40.00	\$40.00			

Note: You will see the rental that you have keyed in.

Unauthorized										
<input type="checkbox"/>		Rental	Rental	Yes	1	\$40.00	\$40.00	ALLEN FRANTZ	Customer	Unauthorized
		Sub Total				\$40.00	\$40.00			
		Grand Total				\$40.00	\$40.00			

6. Unlock the claim by Clicking the **Unlock** button.



7. Customer service you will need to message your Team Lead in Microsoft Teams for the claim to be authorized for reimbursement. Refer to SOP: "Assigning a Task" in the Customer Service Knowledge Base.
8. Refer to SOP: "Notating in CMS" in the Customer Service Knowledge Base.



SOP: Keying Rental Reimbursement

Approval & Revision

Date Created 12/02/2022	Created By Charles Dunn	Date Approved 12/30/2022	Approved By Felicia Mainiero	
Date Revised 08/01/2023	Revised by Melissa Bryant	Revision Description Added Fast Track Article	Date Approved 08/01/2023	Approved By Amanda Wiseman
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]